

# Epic Financial, LLC

## Form ADV Part 2B – Brochure Supplement

*For*

### **Andrew Tisler**

Managing Member and Chief Compliance Officer

Dated March 3, 2014

This brochure supplement provides information about Andrew Tisler that supplements the Epic Financial, LLC brochure. A copy of that brochure precedes this supplement. Please contact Mr. Tisler if the Epic Financial, LLC brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Andrew Tisler is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

# Item 2: Educational Background and Business Experience

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**Andrew Tisler**

Born: 1983

## **Educational Background**

- 2005 – B.S. Finance, Kent State University

## **Business Experience**

- 2013 – Present, Epic Financial, LLC, Managing Member and Chief Compliance Officer
- 2006 – 2013, Jentner Wealth Management – Director of Wealth Management

## **Professional Designations, Licensing & Exams**

- **CFP (Certified Financial Planner)®**: CFP certificants must have a minimum of three years' workplace experience in financial planning and develop their theoretical and practical financial planning knowledge by completing a comprehensive course of study approved by CFP Board. They must pass a comprehensive two-day, 10-hour CFP® Certification Examination that tests their ability to apply financial planning knowledge in an integrated format. As a final step to certification, CFP practitioners agree to abide by a strict code of professional conduct.

# Item 3: Disciplinary Information

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Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

## Item 4: Other Business Activities

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Mr. Tisler provides bookkeeping services on a contract basis to Commonwealth Square Owners' Association. Mr. Tisler spends less than one hour per week on this activity.

## Item 5: Additional Compensation

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Other than salary, annual bonuses, or regular bonuses, Mr. Tisler does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Epic Financial, LLC.

## Item 6: Supervision

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Mr. Tisler, as Managing Member and Chief Compliance Officer of Epic Financial, LLC, is responsible for supervision. He may be contacted at the phone number on this brochure supplement.

## Item 7: Requirements for State Registered Advisers

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1. Mr. Tisler has NOT been involved in any of the events listed below.
  - a. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
    - i. An investment or an investment-related business or activity;
    - ii. Fraud, false statements, or omissions;
    - iii. Theft, embezzlement, or other wrongful taking of property;
    - iv. Bribery, forgery, counterfeiting, or extortion; or
    - v. Dishonest, unfair, or unethical practices.
  - b. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
    - i. An investment or an investment-related business or activity;
    - ii. Fraud, false statements, or omissions;

- iii. Theft, embezzlement, or other wrongful taking of property;
  - iv. Bribery, forgery, counterfeiting, or extortion; or
  - v. Dishonest, unfair, or unethical practices.
2. Mr. Tisler has NOT been the subject of a bankruptcy petition at any time.